Project Tracking System

ADRA

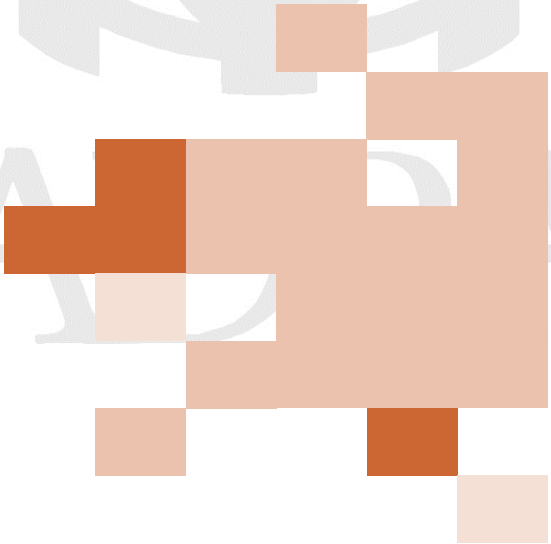
Project Tracking System

Bern March 2012

© ADRA EUD

ADRA Project Tracking System

User Manual



Project Tracking System

Project Tracking System

Directory	Page
Preliminaries	6
View Information	8
View at different levels	10
View as Supporting- or as Implementing Office	11
Sort according to columns	12
Status of projects	13
Archives	14
Icons	15
Status of projects	16
Statistics	16
Enter and edit information	18
Password	19
Start a project	20
Project number	21
Disaster response projects, Reuters	22
Currencies	24
Upload documents	26
Human interest stories HIS	26
Note pad	27
Add a donor	28
Tasks of ADRA offices	29
Actual cost / Money transfers	30
Change of status	32

Project completed	**33**
Staff Travel Coordination Tool (STCT)	**34**
Supporting Offices view / Funding Opportunities (Donor Mapping)	**36**
Import export project data	**37**
Icons	**38**

Preliminaries

The ADRA Project Tracking System is a web based data base.
There is no need to install a special software on your computer. It does work on the most common internet browsers, but works best and fastest on Google Chrome.

It can be accessed on www.adra-members.org
ADRA country offices that would like to use it can ask for a login from ADRA EUD. There is one login per country offices. Individuals may ask for a special login to view the system.
ADRA EUD provides this service in the spirit of "Information Sharing".

The use of the "Project Tracking System" (PTS) is compulsory (see ADRA EUD board action 05-03 of September 29, 2005) for the ADRA country offices located within the ADRA EUD region. This is a service provided by the ADRA EUD office to its country offices within the EUD. It was designed in a way that it can easily be used by each ADRA country office in the entire ADRA network. The ADRA EUD board decided however that a small user fee would be requested. This income would contribute to develop and adapt this tool to new requirements. So far emphasis has been given to keep the tool user-friendly, without many graphics. It has been used successfully by the ADRA EUD country offices since September 2005. At the end of 2011 a new more modern version has been rolled out. The system helps ADRA offices to share information and to have project files organized. One of the nice side effects is that it helps ADRA to set protocols and procedures in place in order to work more professionally and in a more organized way.

In connection with this tool ADRA EUD has developed some important rules such as:

- The initiative to plan and start a project shall come from the implementing (beneficiary) side.
- Each project shall be documented by the following documents:
  - Proposal
  - Budget
  - Time schedule
  - Project agreement
  - Interim and final report(s)
  - Evaluation report
  - Any other document as required by the donor organization and/or needed for a successful implementation of the project like:
    Local agreements, maps, graphics, photographs, videos (352x288 pixels), etc.
- Human Interest Stories, pictures and video clips
- A note pad
- A list of bank transfers

The system does also provide an electronic archive which will be accessible from the internet for five years. All data recorded on the PTS will be backed up automatically.

View information!

Enter the ADRA Members website.

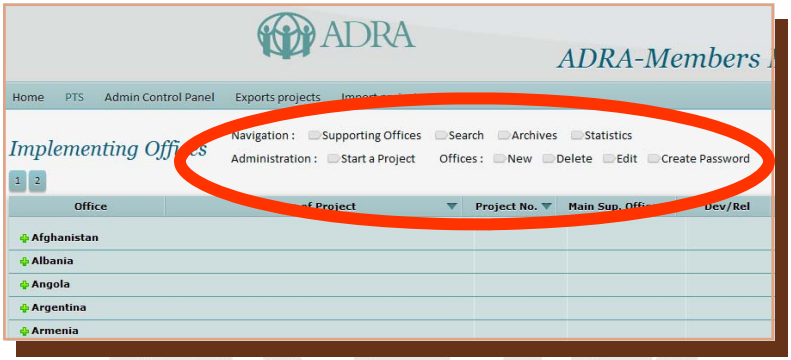
As user you need a **collective login** per office. As a viewer you may get a personal login.

You will now see the list of ADRA **Implementing offices**.

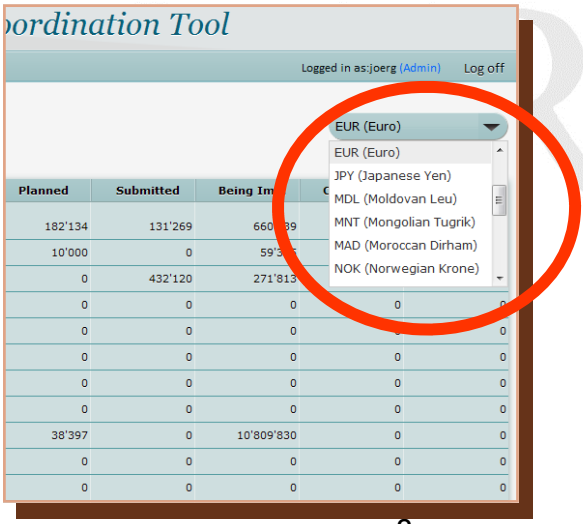
Should the country your need be missing, please notify j.fehr@adra.eu

In the "**Navigation**" line you can:

- Switch between "**Implementing Offices**" and "**Supporting Offices**".
- **Search for Projects** and Supporting Offices
- Look at the **Archives**
- Look at **Statistics**



The **basic currency is EUR**, but you can also switch to other currencies. The system will then convert based on the current Yahoo exchange rates as published on the web.

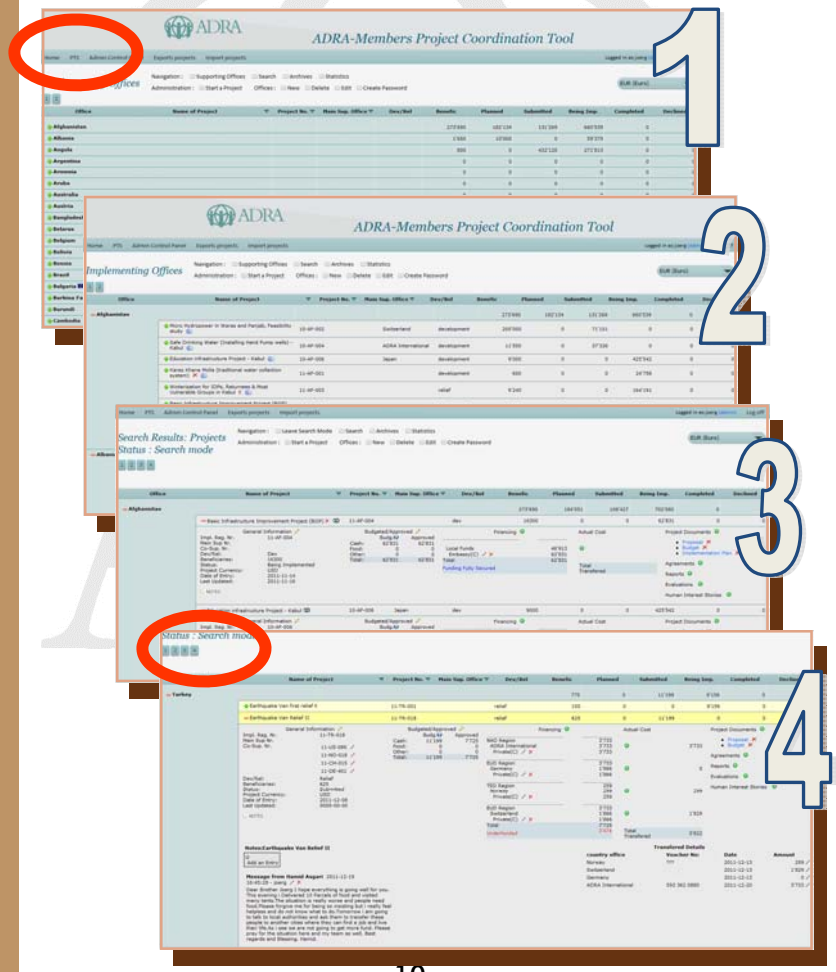


Levels

You can view these lists at four different levels:

1. Country offices
2. Country offices and name of projects
3. Country offices, name of projects and detail information about project
4. Country Office, name of projects, detail information about project, notes and list of transfers.

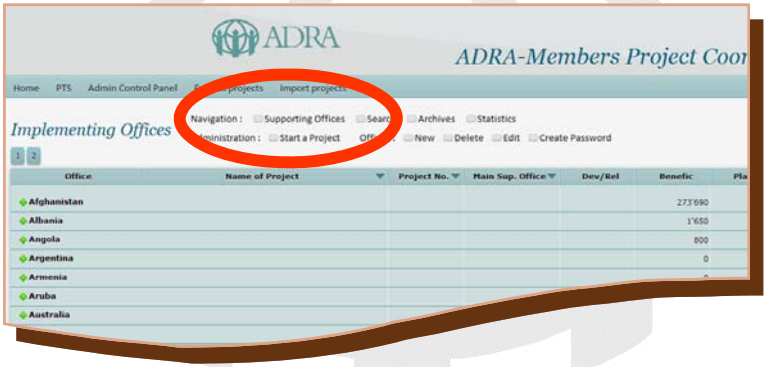
Level 3 and 4 can be viewed in search mode only.



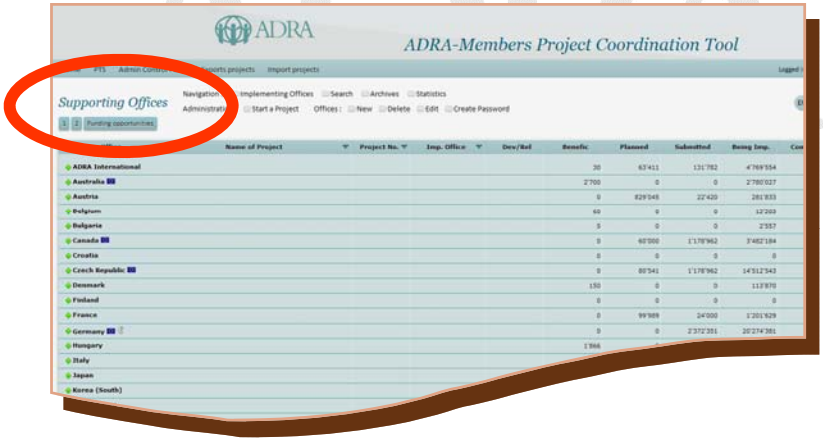
View information as Supporting Office or as Implementing Office

In the navigation line click on "Supporting Offices". The project list for the supporting offices is created automatically while they are entering their financial contributions to a project.

To view the project listed according to supporting offices, click on "Supporting Offices" in the navigation line. You will then see the list of supporting offices.

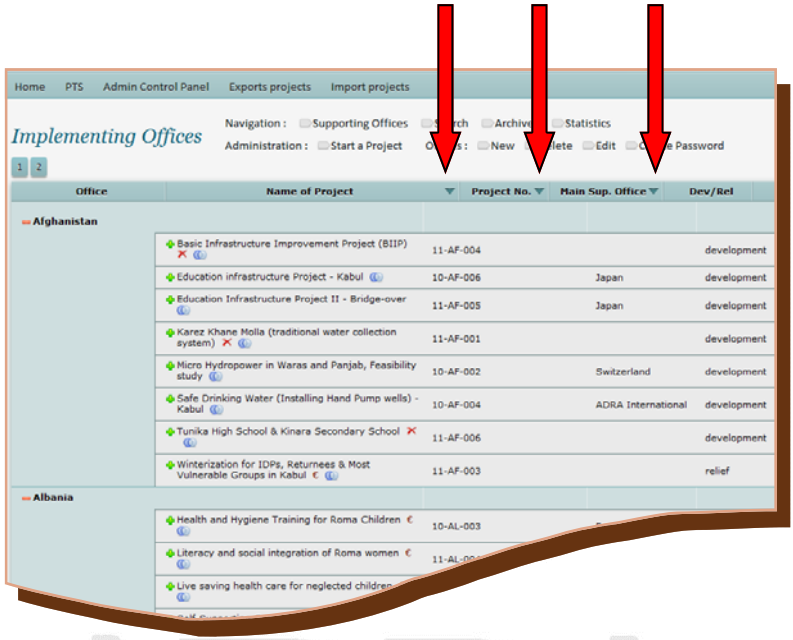


List according to "Implementing Offices"



Sort according to columns

On level 2, you can either **sort** the projects in alphabetical order according to the **name of the project**, the **project number** or according to the name **of the Supporting- Implementing Office**.


Home
PTS
Admin Control Panel
Exports projects
Import projects
Implementing Offices
Navigation : Supporting Offices
Administration : Start a Project
Statistics
New
Edit
Password
Office
Name of Project
Project No.
Main Sup. Office
Dev/Rel
Afghanistan
Basic Infrastructure Improvement Project (BIIP) 11-AF-004 development
Education infrastructure Project - Kabul 10-AF-006 Japan development
Education Infrastructure Project II - Bridge-over 11-AF-005 Japan development
Karez Khane Molla (traditional water collection system) 11-AF-001 development
Micro Hydropower in Waras and Panjab, Feasibility study 10-AF-002 Switzerland development
Safe Drinking Water (Installing Hand Pump wells) - Kabul 10-AF-004 ADRA International development
Tunika High School & Kinara Secondary School 11-AF-006 development
Winterization for IDPs, Returnees & Most Vulnerable Groups in Kabul 11-AF-003 relief
Albania
Health and Hygiene Training for Roma Children 10-AL-003
Literacy and social integration of Roma women
Live saving health care for neglected children

ADRA

Status of Projects!

Projects recorded in the PTS have one of the following status:

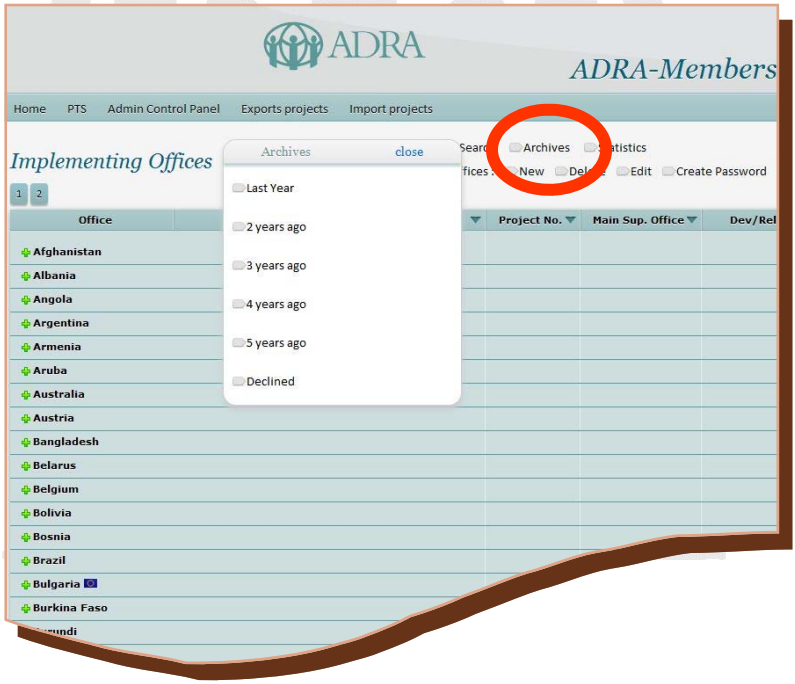
- **Planned**
  A project shall get the status "Planned" when:
  - The ADCOM has decided to plan a certain project.
  - A first cost estimate has been made.
- **Submitted**
  A project shall get the status "submitted" when:
  - The proposal has been submitted to a local donor and/or to at least one ADRA supporting office.
  - The "Notes" function in the PTS shall be used to indicate to which donor(s) the proposal has been submitted.
- **Being Implemented**
  A project shall get the status "Implemented" when:
  - Funds to cover the full budget have been fully secured to successfully implement the project.
  - A project agreement has been signed between all the parties involved.
- **Completed**
  A project shall get the status "completed" when:
  - The Implementation has been fully completed
  - The final report has been accepted by all the parties involved.
- **Declined**
  A project shall get the status "declined" when:
  - After a certain period of time no sufficient funds have been found.
  - Any other reason that would hinder a successful implementation of the project.

Declaration and change of status will be explained page x of this booklet.

Archives!

Projects declared as "Completed" or „Declined" will remain in the current list until 31 December. Then at midnight they will be transfer into the archive automatically.
You will find a separate archive for:

- Last year
- 2 years ago
- 3 years ago
- 4 years ago
- 5 years ago
- Declined

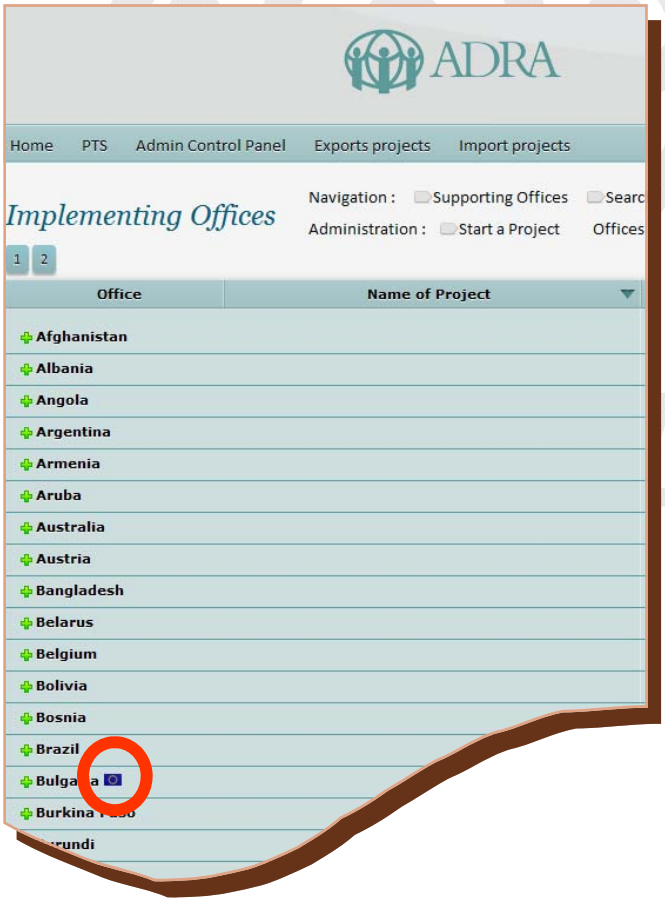


Different Icons:

The **Europe flag** indicates that an EU project has been recorded.

A small video projector indicates that a short **video** has been uploaded and can be streamed online.
You will either find them in the "Documents" and/or "Interim Reports".

The **€** (EUR) sign calls for funding!



Statistics!

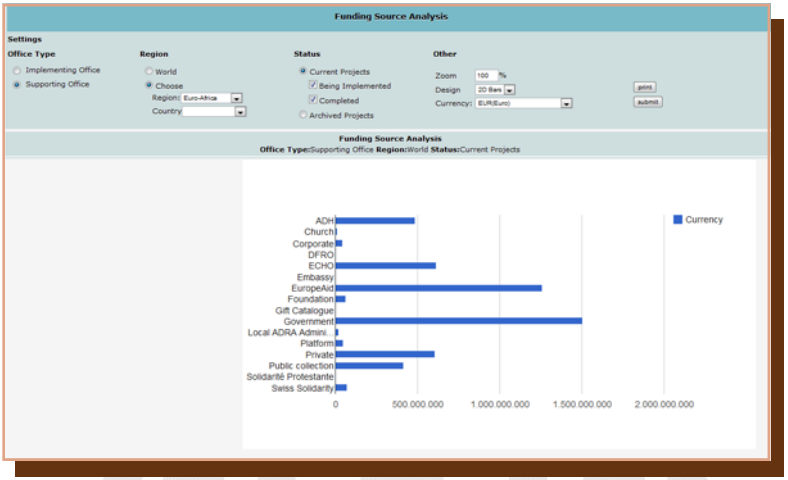
A „Funding Source Analysis" tool is build into the system.
You can analyse funding sources at different levels:

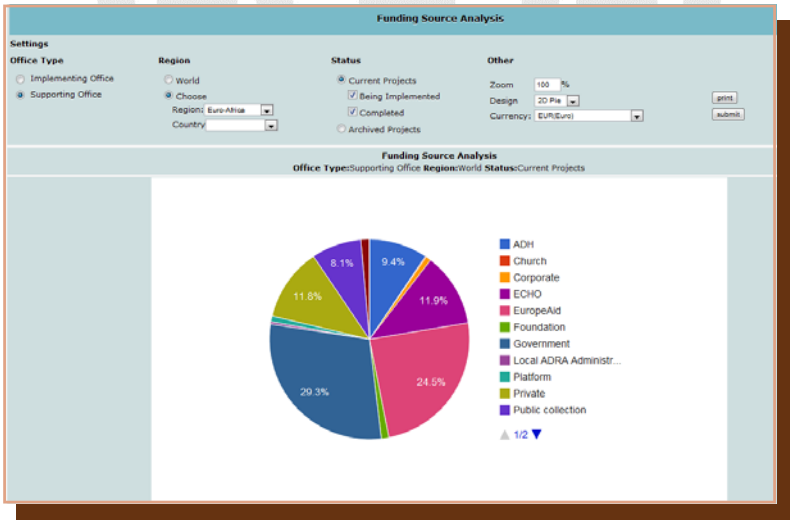
- World
- Regions
- Countries

The analysis is based on the project that are being implemented and/or have been completed since the beginning of the current calendar year.

The graphics can be viewed in two different forms:

- 2D bars
- 2D pie


Funding Source Analysis
Settings
Office Type
Implementing Office
Supporting Office
Region
World
Choose
Region: Euro-Africa
Country
Status
Current Projects
Being Implemented
Completed
Archived Projects
Other
Zoom 100 %
Design 2D Bars
Currency: EUR(Euro)
print
submit
Funding Source Analysis
Office Type:Supporting Office Region:World Status:Current Projects
ADH
Church
Corporate
DFRO
ECHO
Embassy
EuropeAid
Foundation
Gift Catalogue
Government
Local ADRA Admini...
Platform
Private
Public collection
Solidarité Protestante
Swiss Solidarity
Currency
0
500.000.000
1.000.000.000
1.500.000.000
2.000.000.000


Funding Source Analysis
Settings
Office Type
Implementing Office
Supporting Office
Region
World
Choose
Region: Euro-Africa
Country
Status
Current Projects
Being Implemented
Completed
Archived Projects
Other
Zoom 100 %
Design 2D Pie
Currency: EUR(Euro)
print
submit
Funding Source Analysis
Office Type:Supporting Office Region:World Status:Current Projects
9.4%
11.9%
24.5%
29.3%
11.8%
8.1%
ADH
Church
Corporate
ECHO
EuropeAid
Foundation
Government
Local ADRA Administr...
Platform
Private
Public collection
1/2

How to use it!

Enter and edit information:

Important

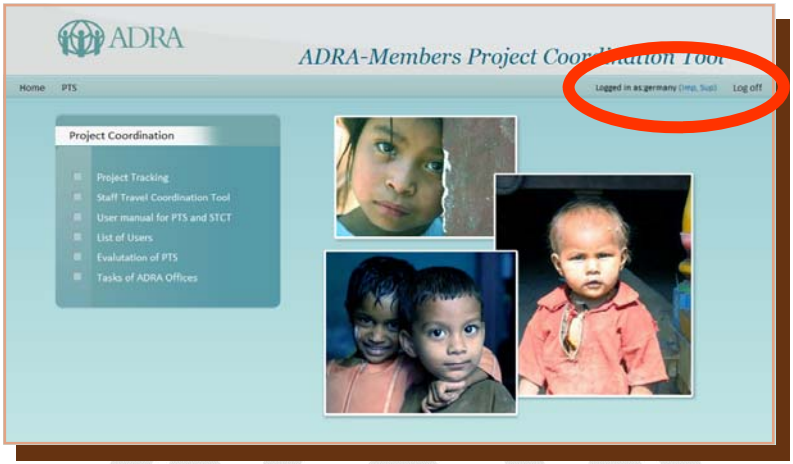
Again, the initiative to plan and start a project shall come from the implementing (beneficiary) side. Supporting offices may propose opportunities to implementing offices, but the registration of a new project will have to be done by the implementing office.
Supporting offices may only register a project for implementing offices which did not yet buy into the system. In this case, the supporting office will do all the editing in behalf of the implementing office. It will automatically have the login rights to do so.
We have to be aware that a project will go through different stages such as:

- **Planned**
- **Submitted**
- **Being Implemented**
- **Completed or Declined**

Explanations concerning the different stages or **status** of the project as outlined in the ADRA EUD Operations Policies you find on page 13.
As soon as you decide to plan a certain project. And you have a rough cost estimate it is time to

register the project in the PTS!

Once you logged into the system you will see the name of your country and if you are registered as an "implementing-" or a "supporting office".

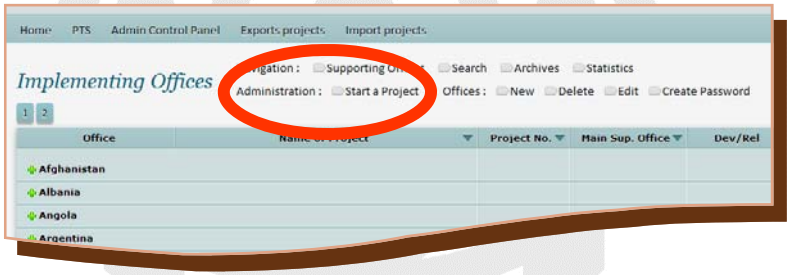


Please take note that you can change your password. For security reason it is good to change your password every three months. If one of your employees who knows the password leaves the office you will have to change it anyway. You would not want that somebody who is not working for your office knows your password and can still access and make changes in the system.

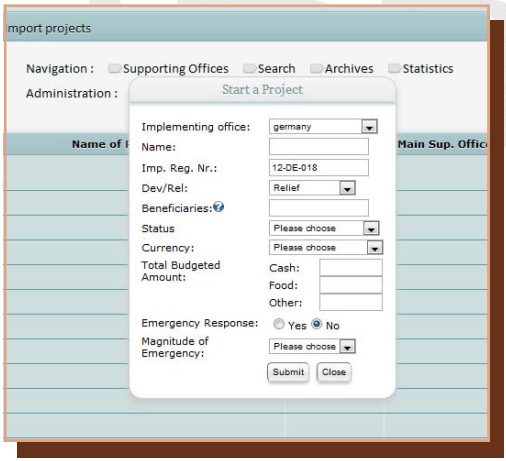
The office login gives you automatically the access rights for entering and editing data concerning your country office and for those offices which have not yet subscribed to the PTS.

Important!
Do not change the username.
Only change the password from time to time.

Start a project
To start a project you have to click at "Start a new project" In the "Administration" menu line.



A popup window will appear and you will have to enter the required data.



(Fortsetzung auf Seite 21)

Chose the "Implementing Office". By default you will see your own office. The dropdown list will show only those office that have not registered into the system. Remember the rule that the initiative to plan and start a project shall come from the implementing (beneficiary) side. As soon as an implementing office is part of the system it will start its own project.

Enter the **name of the project**. The name of a project should be short and typical. Use only the English language.

Enter the **project number**. The system proposes a number. If you do not have your own numbering system we recommend the following:
Year (two digits), ISO country code (two letters), three digit number starting with 001 at the beginning of each year. You can also add the initials of the desk officer.
Example:
12-CH-001-JF

Chose between "**Development**" and "**Relief**"

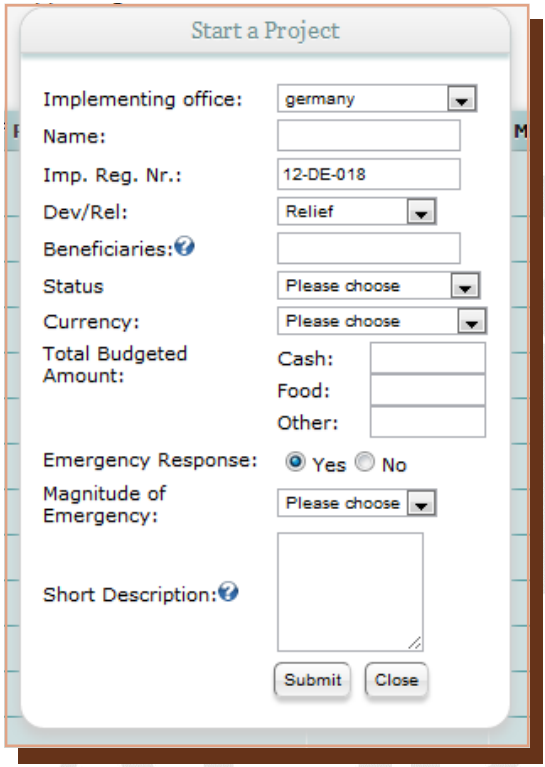
Enter the number of "**Beneficiaries**"

Chose the "Status" of the project. I will be "Planned"

Chose the **currency**. If your currency is not shown in the dropdown list call the administrator.

When you declare a project as "Relief" you have also the possibility to mark it as "Emergency Response" by clicking the "Yes" button in the line "**Emergency Response**". The window will then enlarge asking for some more information.

You will have to select the "Magnitude of the Emergency". According to the magnitude selected the background of the project line will be in light yellow for very small to dark red for very large.



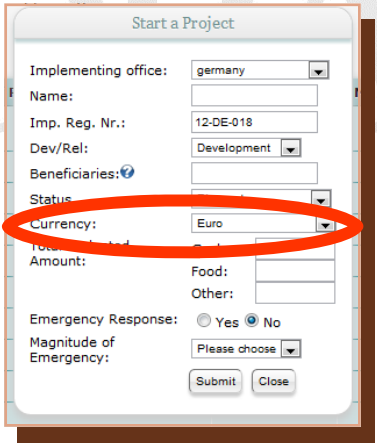
In a small window you will have to give some information concerning the project. This information will then be sent to the "**Reuters Alert-Net**" automatically by an RSS feed. Since ADRA is a member of the "Reuters Foundation" we also have to send in information about what ADRA is doing.

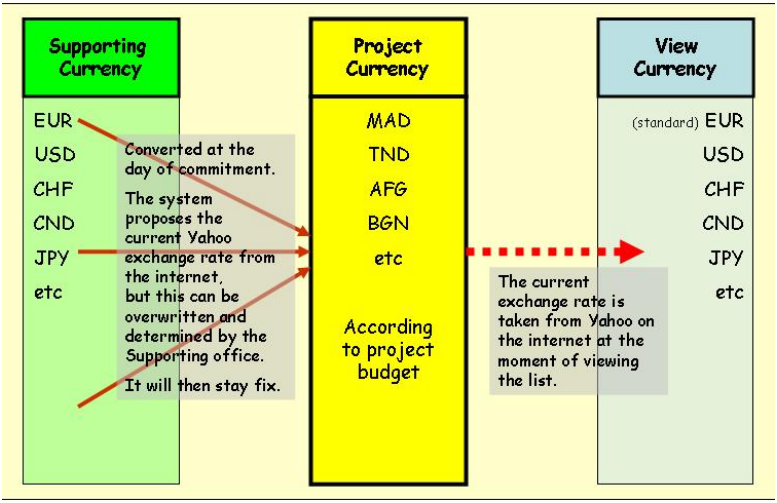
ADRA

Currencies

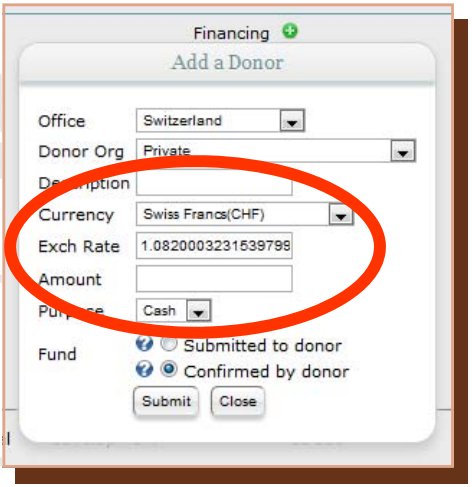
Usually the budget is based on the local currency.
In case where the local currency is very soft, that budget can also be based on a hard foreign currency like the Euro or the US Dollar.
Users of the system would like to see the project list and its figures in their local currency. They may also want to present reports in form of current project lists to their board, ADCOM or any other purposes. Of course this reports should be base on their local currency. They system is designed in a way that it can take into account all of these factors.
The implementing office which starts the project can enter budgeted amounts in local currency. They system will then convert this amount into the base currency of the PTS which is the EUR.
Supporting offices can pledge and commit money in their currency. The system will automatically propose the current exchange rate, but the user may overwrite this and define its own exchange rate. This will then stay fix until the end of the project.
As mentioned above, viewers can view the list according to their currency.

Project Currency:

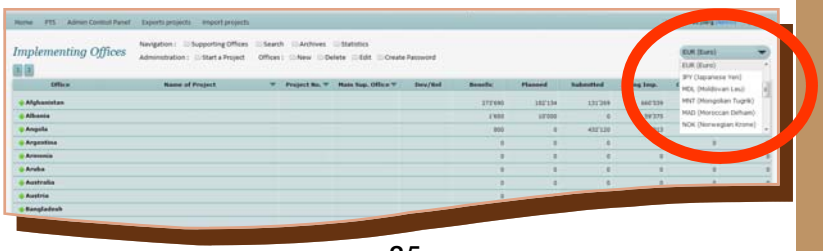




Supporting Currency:



Display Currency:



Upload any **document** which is related to your project. In the planning stage you will probably upload only a concept paper and a rough cost estimate. Before a project reaches the "Being Implemented" status, you will have to upload the following documents:

- Concept paper (will be replaced by proposal)
- Proposal, describing the scope of work
- Budget reflecting the cost
- Time schedule showing the duration of the project
- Annexes such as official requests or declarations, agreements, maps, photographs, etc.

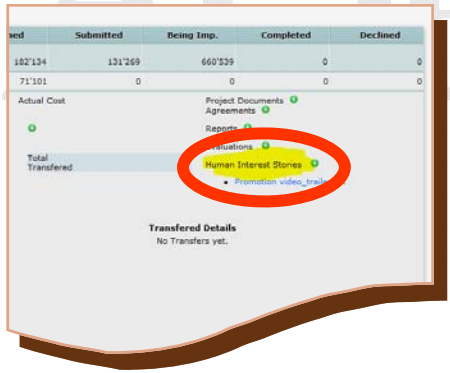
Once the funding is secured and before the implementation will start, you will have to sign a project agreement between Implementing - Supporting office and Co-Supporting Office. Provisions are made in the system to upload also "Project Agreements".

Later on, as the implementation of the project progresses, you will also upload "Interim-", "Final-" and "Evaluation-Reports".

Under annexes you can also upload short videos in a "Windows Media Compatible" format. The resolution must be 352x288.

Human Interest Stories:

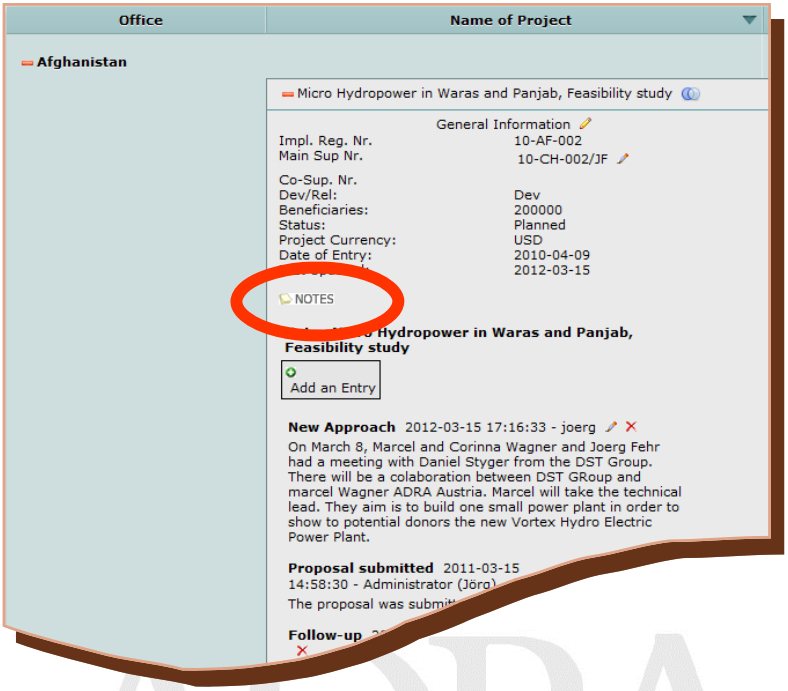
In this section you can upload Human Interest Stories (HIS).



Be aware that your supporting offices are looking for HIS in order to touch the hearts of their donors. These are the stories that donors want to hear. They show how ADRA is saving and changing lives.

Notes section:

Use the "Notes" section to keep log of steps, actions and small verbal agreements. It can be used like a blog.
All parties involved can add and read comments. It helps the network to be transparent.


Office
Name of Project
Afghanistan
Micro Hydropower in Waras and Panjab, Feasibility study
General Information
Impl. Reg. Nr. 10-AF-002
Main Sup Nr. 10-CH-002/JF
Co-Sup. Nr.
Dev/Rel: Dev
Beneficiaries: 200000
Status: Planned
Project Currency: USD
Date of Entry: 2010-04-09
2012-03-15
NOTES
Hydropower in Waras and Panjab, Feasibility study
Add an Entry
New Approach 2012-03-15 17:16:33 - joerg
On March 8, Marcel and Corinna Wagner and Joerg Fehr had a meeting with Daniel Styger from the DST Group. There will be a colaboration between DST GRoup and marcel Wagner ADRA Austria. Marcel will take the technical lead. They aim is to build one small power plant in order to show to potential donors the new Vortex Hydro Electric Power Plant.
Proposal submitted 2011-03-15
14:58:30 - Administrator (Jörg)
Follow-up

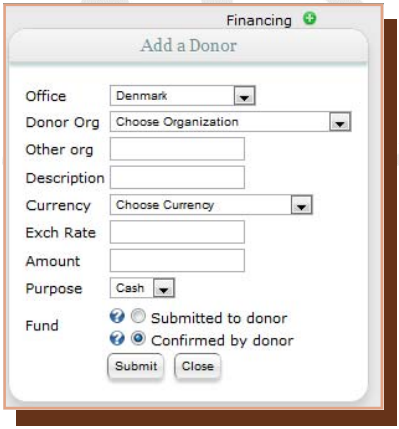
ADRA

Add a donor!

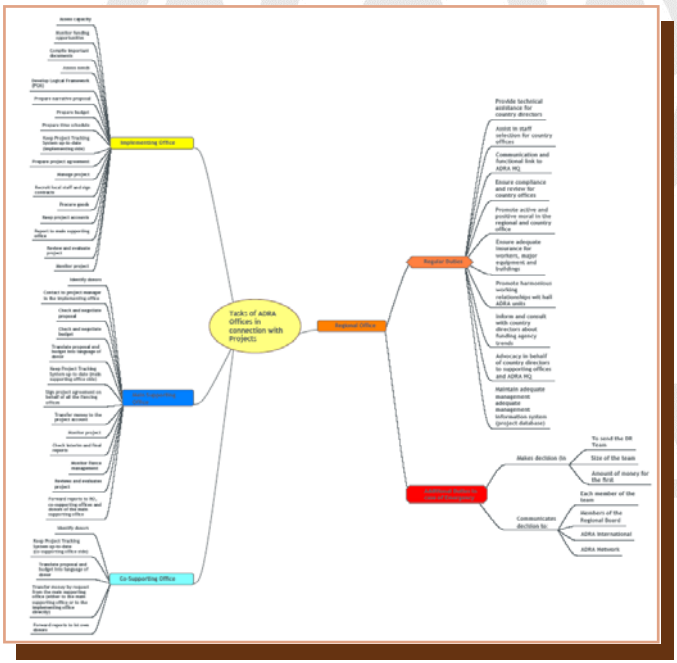
If you get contributions locally, you can add a local donor. Click on the small green button next to "Financing".

In a drop down menu you will be able to choose from different categories of donors. These different categories will be reflected later on in the "Funding Source Analysis" (statistics).

If your donor has already conformed his donation you can click on "Confirmed by donor" if your donor has not yet confirmed his contribution you click on "Submitted to donor"



Normally supporting offices will **join a project** add their donations to the system directly.
This can be done either by clicking on the green button next to "Finances" or by clicking on the two rings behind the project title.
A pop-up window will then ask you to enter the data concerning your office.
If there are several supporting offices, one (usually the one with the biggest contribution) will act as "Main Supporting Office". Other supporting offices will act as "Co-Supporting Offices". The roles of these different actors are clearly defined in the document "**Tasks of ADRA Offices**".



The implementing office will have to negotiate with the different supporting offices on which office will become the "Main Supporting Office". Your login will give you the rights to **edit** and **delete** data.

Actual Cost / Money Transfers!

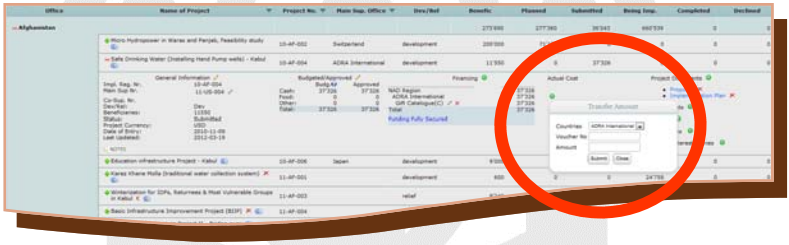
Once the project has been approved by all the donors which are involved, implementation may start.

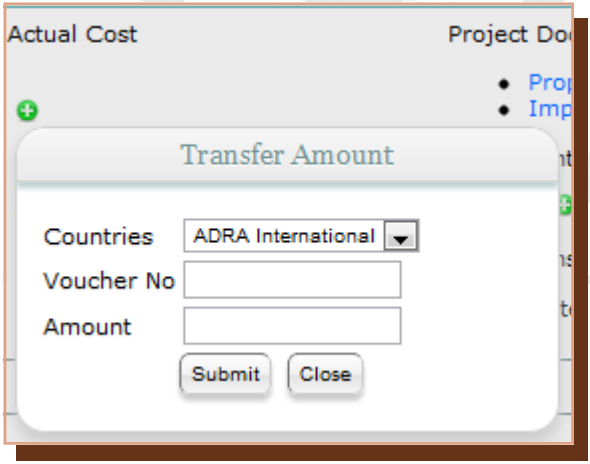
Money will be transferred to the project bank account.

From:

- The local donor to the implementing office
- The main supporting office to the implementing office
- The co-supporting office to the implementing office

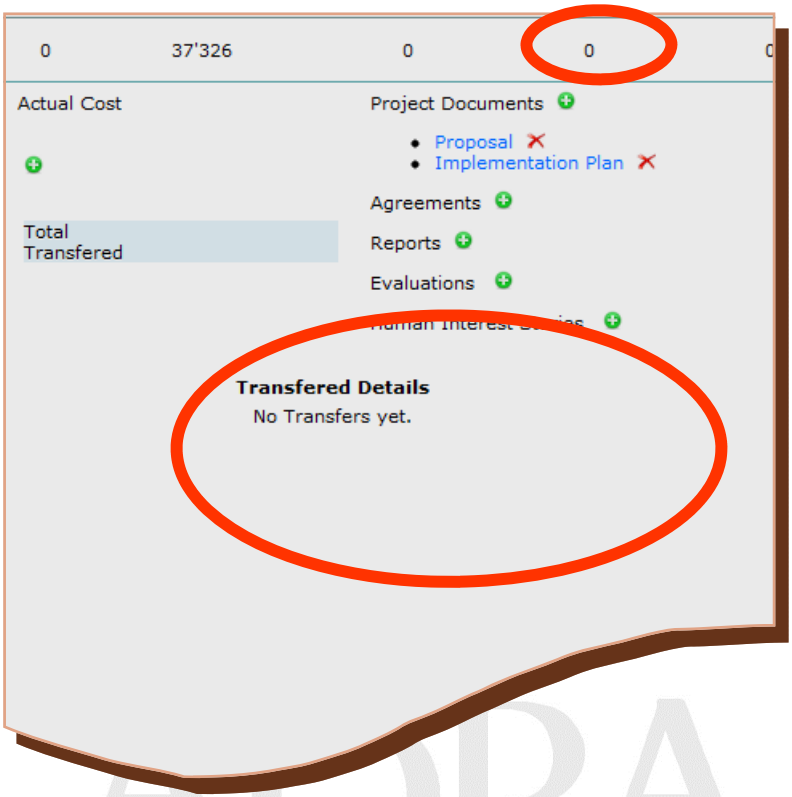
To record a transfer, click on the green button in the section "Actual Cost". Fill in the fields in the pop-up window and click submit.





The total of transfers will be shown under "Actual Cost" and in the column "Completed".

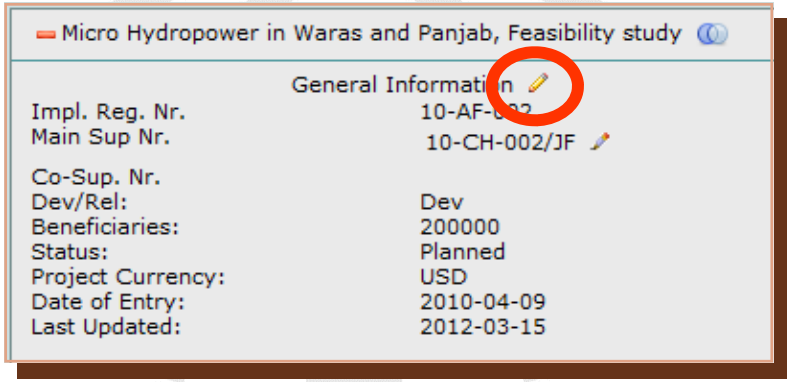
A list of all the transfers will be shown in level 4 under "Transfer Details".
To view one project under level 4, click on "Notes".

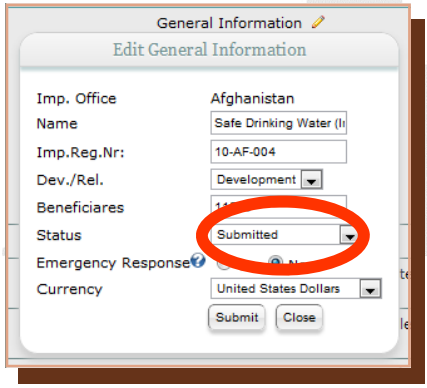


ADRA

Change of Status:
Planned
Submitted
Being Implemented
Completed / Declined
(see also page 13)

Open the project on level 3 and edit "General Information. A small window will open where you can select from a drop down menu the status.

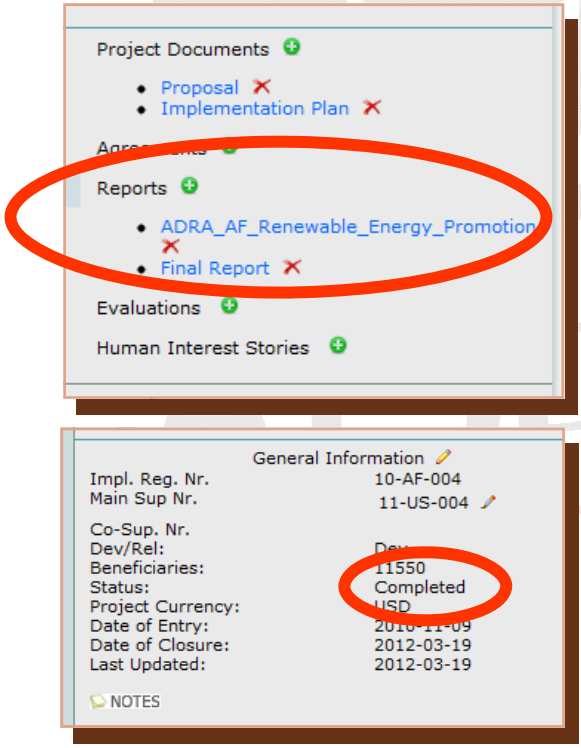




Make these changes as soon as the status of the project changes!

Project completed:
When the implementation of a project is completed the implementing office will write a final report which includes all relevant document. The narrative report, finance report, photographs and nay other document should be combined in one pdf file. This file can then be uploaded in the PTS as "Final Report".
The offices that have contributed to the project will then submit the final report to their donors.

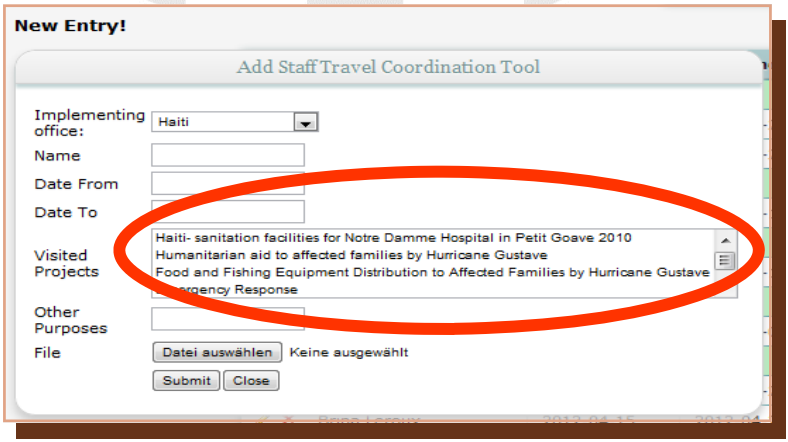
Only after having received **written confirmation** from all the offices involved into the project, the implementing office may change the status of the project to "**Completed**.



Staff Travel Coordination Tool (STCT)

The Staff Travel Coordination Tool is an online instrument to make staff trips visible to our colleagues.

It is interlinked with the PTS. You will have to use the same login as you are using to make changes in the PTS. You will then be allowed to make new entries and to edit you own recordings. In a pop-up window you will then be asked to give all the information necessary.

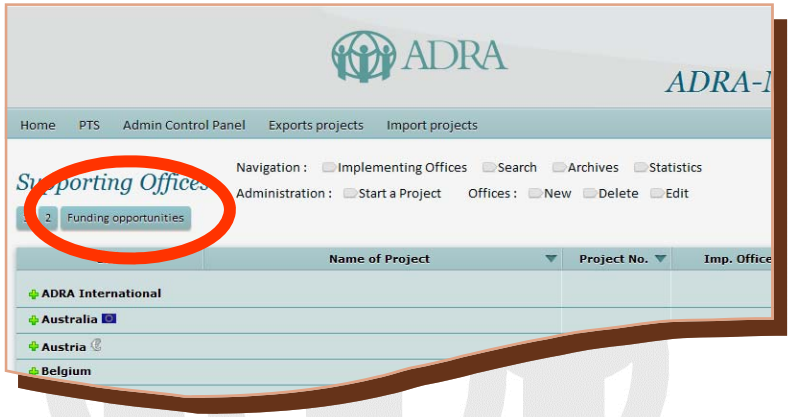


In a drop-down list you can select the country your are going to visit. Enter your name. In a pop-up calendar you can select the dates. In the section "**Visited Projects**" you will see all the projects recorded in that selected country. With a mouse click you can select the project your are going to visit. Holding down the ctrl key will allow you to select several projects at the same time.
If you have other business to do in that country, please indicate it in the section "**Other Purposes**".
You can also upload files which are related to your trip. This is especially helpful to up-load trip reports.
If you hover with your mouse cursor over the bar a small pop-up window will show you **which projects** the person will be visiting.
A click on the bar will show you which files have been uploaded. You can download such files on your computer or you can view them online.

Important!
Our colleagues from the ADRA implementing offices wish that project and any other visits would be more coordinated in between the supporting offices. They wish that visitors would come to visit projects at the same time. This would safe them time and money.

Supporting Offices view / Funding Opportunities (Donor Mapping)

In the list of the "Supporting Offices" you will find a button "Funding Opportunities"



Clicking on this button will open a new tab in your internet explorer.

Supporting offices may communicate "Funding Opportunities" and show their "Target Implementing Offices".

You have several columns to show your donor focus in detail.

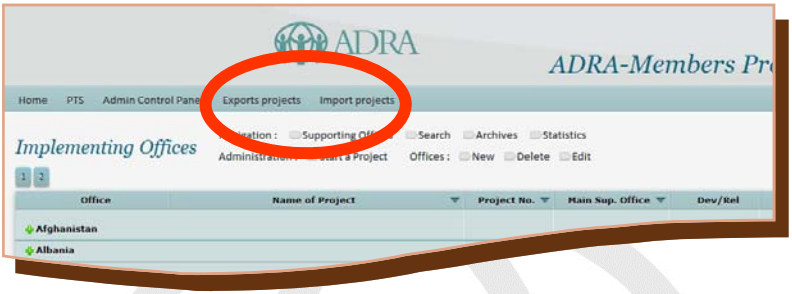
- National government
- EuropeAid
- ECHO
- DIPECHO
- Private donor interest
- Fundraising agencies
- Other

You can show if your office has a general interest and if you have signed a "Partnership Agreement".

This list will help the network to coordinate target areas.

Import and Export Projects

In these sections you find a tool to import or export project data into Excel.



Icons:

Write, edit

Delete

Join a project

Add a document, add funds

The project is still under funded, funds needed

Video stream is available

Human Interest Story is available

European Union project (EuropeAid or ECHO, etc)

ADRA

Project Tracking System